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60975	7590	12/11/2009

CAMPBELL STEPHENSON LLP
11401 CENTURY OAKS TERRACE
BLDG. H, SUITE 250
AUSTIN, TX 78758

EXAMINER
MEINECKE DIAZ, SUSANNA M

ART UNIT	PAPER NUMBER
3684	

DATE MAILED: 12/11/2009

APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
10/008,254	11/09/2001	Prasanna Amerasinghe	OIC0153US	7429

TITLE OF INVENTION: FORECASTING AND REVENUE MANAGEMENT SYSTEM

APPLN. TYPE	SMALL ENTITY	ISSUE FEE DUE	PUBLICATION FEE DUE	PREV. PAID ISSUE FEE	TOTAL FEE(S) DUE	DATE DUE
nonprovisional	NO	$1510	$300	$0	$1810	03/11/2010

**THE APPLICATION IDENTIFIED ABOVE HAS BEEN EXAMINED AND IS ALLOWED FOR ISSUANCE AS A PATENT.
PROSECUTION ON THE MERITS IS CLOSED.** THIS NOTICE OF ALLOWANCE IS NOT A GRANT OF PATENT RIGHTS.
THIS APPLICATION IS SUBJECT TO WITHDRAWAL FROM ISSUE AT THE INITIATIVE OF THE OFFICE OR UPON
PETITION BY THE APPLICANT. SEE 37 CFR 1.313 AND MPEP 1308.

THE ISSUE FEE AND PUBLICATION FEE (IF REQUIRED) MUST BE PAID WITHIN **THREE MONTHS** FROM THE
MAILING DATE OF THIS NOTICE OR THIS APPLICATION SHALL BE REGARDED AS ABANDONED. **THIS
STATUTORY PERIOD CANNOT BE EXTENDED.** SEE 35 U.S.C. 151. THE ISSUE FEE DUE INDICATED ABOVE DOES
NOT REFLECT A CREDIT FOR ANY PREVIOUSLY PAID ISSUE FEE IN THIS APPLICATION. IF AN ISSUE FEE HAS
PREVIOUSLY BEEN PAID IN THIS APPLICATION (AS SHOWN ABOVE), THE RETURN OF PART B OF THIS FORM
WILL BE CONSIDERED A REQUEST TO REAPPLY THE PREVIOUSLY PAID ISSUE FEE TOWARD THE ISSUE FEE NOW
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HOW TO REPLY TO THIS NOTICE:

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If the SMALL ENTITY is shown as YES, verify your current
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B. If the status above is to be removed, check box 5b on Part B -
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and twice the amount of the ISSUE FEE shown above, or

If the SMALL ENTITY is shown as NO:

A. Pay TOTAL FEE(S) DUE shown above, or

B. If applicant claimed SMALL ENTITY status before, or is now
claiming SMALL ENTITY status, check box 5a on Part B - Fee(s)
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II. PART B - FEE(S) TRANSMITTAL, or its equivalent, must be completed and returned to the United States Patent and Trademark Office
(USPTO) with your ISSUE FEE and PUBLICATION FEE (if required). If you are charging the fee(s) to your deposit account, section "4b"
of Part B - Fee(s) Transmittal should be completed and an extra copy of the form should be submitted. If an equivalent of Part B is filed, a
request to reapply a previously paid issue fee must be clearly made, and delays in processing may occur due to the difficulty in recognizing
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III. All communications regarding this application must give the application number. Please direct all communications prior to issuance to
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**IMPORTANT REMINDER: Utility patents issuing on applications filed on or after Dec. 12, 1980 may require payment of
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PTOL-85 (Rev. 08/07) Approved for use through 08/31/2010.

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Complete and send this form, together with applicable fee(s), to: <u>Mail</u> Mail Stop ISSUE FEE
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_____ (Depositor's name)

_____ (Signature)

_____ (Date)

APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
10/008,254	11/09/2001	Prasanna Amerasinghe	OIC0153US	7429

TITLE OF INVENTION: FORECASTING AND REVENUE MANAGEMENT SYSTEM

APPLN. TYPE	SMALL ENTITY	ISSUE FEE DUE	PUBLICATION FEE DUE	PREV. PAID ISSUE FEE	TOTAL FEE(S) DUE	DATE DUE
nonprovisional	NO	$1510	$300	$0	$1810	03/11/2010

EXAMINER	ART UNIT	CLASS-SUBCLASS
MEINECKE DIAZ, SUSANNA M	3684	705-010000

1. Change of correspondence address or indication of "Fee Address" (37 CFR 1.363).

☐ Change of correspondence address (or Change of Correspondence Address form PTO/SB/122) attached.

☐ "Fee Address" indication (or "Fee Address" Indication form PTO/SB/47; Rev 03-02 or more recent) attached. **Use of a Customer Number is required.**

2. For printing on the patent front page, list

(1) the names of up to 3 registered patent attorneys or agents OR, alternatively,

(2) the name of a single firm (having as a member a registered attorney or agent) and the names of up to 2 registered patent attorneys or agents. If no name is listed, no name will be printed.

1 _____

2 _____

3 _____

3. ASSIGNEE NAME AND RESIDENCE DATA TO BE PRINTED ON THE PATENT (print or type)

PLEASE NOTE: Unless an assignee is identified below, no assignee data will appear on the patent. If an assignee is identified below, the document has been filed for recordation as set forth in 37 CFR 3.11. Completion of this form is NOT a substitute for filing an assignment.

(A) NAME OF ASSIGNEE

(B) RESIDENCE: (CITY and STATE OR COUNTRY)

Please check the appropriate assignee category or categories (will not be printed on the patent) :   ☐ Individual ☐ Corporation or other private group entity ☐ Government

4a. The following fee(s) are submitted:

☐ Issue Fee

☐ Publication Fee (No small entity discount permitted)

☐ Advance Order - # of Copies _____

4b. Payment of Fee(s): (Please first reapply any previously paid issue fee shown above)

☐ A check is enclosed.

☐ Payment by credit card. Form PTO-2038 is attached.

☐ The Director is hereby authorized to charge the required fee(s), any deficiency, or credit any overpayment, to Deposit Account Number _____ (enclose an extra copy of this form).

5. Change in Entity Status (from status indicated above)

☐ a. Applicant claims SMALL ENTITY status. See 37 CFR 1.27.

☐ b. Applicant is no longer claiming SMALL ENTITY status. See 37 CFR 1.27(g)(2).

NOTE: The Issue Fee and Publication Fee (if required) will not be accepted from anyone other than the applicant; a registered attorney or agent; or the assignee or other party in interest as shown by the records of the United States Patent and Trademark Office.

Authorized Signature _____   Date _____

Typed or printed name _____   Registration No. _____

PTOL-85 (Rev. 08/07) Approved for use through 08/31/2010.   OMB 0651-0033   U.S. Patent and Trademark Office; U.S. DEPARTMENT OF COMMERCE

UNITED STATES PATENT AND TRADEMARK OFFICE

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60975 7590 12/11/2009	EXAMINER
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DATE MAILED: 12/11/2009

Determination of Patent Term Adjustment under 35 U.S.C. 154 (b)
(application filed on or after May 29, 2000)

The Patent Term Adjustment to date is 1029 day(s). If the issue fee is paid on the date that is three months after the mailing date of this notice and the patent issues on the Tuesday before the date that is 28 weeks (six and a half months) after the mailing date of this notice, the Patent Term Adjustment will be 1029 day(s).

If a Continued Prosecution Application (CPA) was filed in the above-identified application, the filing date that determines Patent Term Adjustment is the filing date of the most recent CPA.

Applicant will be able to obtain more detailed information by accessing the Patent Application Information Retrieval (PAIR) WEB site (http://pair.uspto.gov).

Any questions regarding the Patent Term Extension or Adjustment determination should be directed to the Office of Patent Legal Administration at (571)-272-7702. Questions relating to issue and publication fee payments should be directed to the Customer Service Center of the Office of Patent Publication at 1-(888)-786-0101 or (571)-272-4200.

PTOL-85 (Rev. 08/07) Approved for use through 08/31/2010.

	Application No.	Applicant(s)
Notice of Allowability	10/008,254	AMERASINGHE ET AL.
	Examiner	Art Unit
	Susanna M. Diaz	3684

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address--

All claims being allowable, PROSECUTION ON THE MERITS IS (OR REMAINS) CLOSED in this application. If not included herewith (or previously mailed), a Notice of Allowance (PTOL-85) or other appropriate communication will be mailed in due course. **THIS NOTICE OF ALLOWABILITY IS NOT A GRANT OF PATENT RIGHTS.** This application is subject to withdrawal from issue at the initiative of the Office or upon petition by the applicant. See 37 CFR 1.313 and MPEP 1308.

1. ☒ This communication is responsive to *the Examiner's amendmentagreed to on December 4, 2009*.

2. ☒ The allowed claim(s) is/are *1,2,5,6,12-16,19-21,28-30,45-48,50 and 65-71*.

3. ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

      a) ☐ All   b) ☐ Some*   c) ☐ None   of the:

          1. ☐ Certified copies of the priority documents have been received.

          2. ☐ Certified copies of the priority documents have been received in Application No. _____ .

          3. ☐ Copies of the certified copies of the priority documents have been received in this national stage application from the International Bureau (PCT Rule 17.2(a)).

     * Certified copies not received: _____ .

Applicant has THREE MONTHS FROM THE "MAILING DATE" of this communication to file a reply complying with the requirements noted below. Failure to timely comply will result in ABANDONMENT of this application.
THIS THREE-MONTH PERIOD IS NOT EXTENDABLE.

4. ☐ A SUBSTITUTE OATH OR DECLARATION must be submitted. Note the attached EXAMINER'S AMENDMENT or NOTICE OF INFORMAL PATENT APPLICATION (PTO-152) which gives reason(s) why the oath or declaration is deficient.

5. ☐ CORRECTED DRAWINGS (as "replacement sheets") must be submitted.

    (a) ☐ including changes required by the Notice of Draftsperson's Patent Drawing Review (PTO-948) attached

        1) ☐ hereto or 2) ☐ to Paper No./Mail Date _____.

    (b) ☐ including changes required by the attached Examiner's Amendment / Comment or in the Office action of Paper No./Mail Date _____.

    Identifying indicia such as the application number (see 37 CFR 1.84(c)) should be written on the drawings in the front (not the back) of each sheet. Replacement sheet(s) should be labeled as such in the header according to 37 CFR 1.121(d).

6. ☐ DEPOSIT OF and/or INFORMATION about the deposit of BIOLOGICAL MATERIAL must be submitted. Note the attached Examiner's comment regarding REQUIREMENT FOR THE DEPOSIT OF BIOLOGICAL MATERIAL.

Attachment(s)

1. ☐ Notice of References Cited (PTO-892)

2. ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)

3. ☐ Information Disclosure Statements (PTO/SB/08),
Paper No./Mail Date _____

4. ☐ Examiner's Comment Regarding Requirement for Deposit of Biological Material

5. ☐ Notice of Informal Patent Application

6. ☐ Interview Summary (PTO-413),
Paper No./Mail Date _____ .

7. ☒ Examiner's Amendment/Comment

8. ☐ Examiner's Statement of Reasons for Allowance

9. ☐ Other _____ .

/Susanna M. Diaz/
Primary Examiner, Art Unit 3684

EXAMINER'S AMENDMENT

1.   An examiner's amendment to the record appears below. Should the changes

and/or additions be unacceptable to applicant, an amendment may be filed as provided

by 37 CFR 1.312. To ensure consideration of such an amendment, it MUST be

submitted no later than the payment of the issue fee.

   Authorization for this examiner's amendment was given in a telephone interview

with Jonathan Geld (Reg. No. 44,702) on December 4, 2009.

   The application has been amended as follows:

<u>Amendments to the Claims</u>

1.   **(Currently Amended)**   A computer system comprising:

a processor;

a memory, coupled to the processor, and storing instructions executable on the processor,

     the instructions comprising

     a forecast series creation set of instructions, wherein

          a forecast series associated with the forecast series creation set of
instructions comprises a set of parameters that define attributes of
forecasts that are created from the forecast series, wherein the set
of parameters

               identify hierarchy data defining a hierarchy structure of an
organization, including data identifying a hierarchical
position of each member of the organization, **<u>wherein the
hierarchy structure comprises a plurality of
management levels,</u>**

               identify an acceptable range of dates over which forecasts
generated from the forecast series cover,

identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate forecasts from the forecast series,

identify a visibility mode for forecasts generated from the forecast series,

are employed to generate a forecast series comprising the identity of the hierarchy data, the identity of the acceptable range of dates, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request [[;]] **, and**

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value n defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, and there is at least one level in the hierarchy structure that is below the last level included in the search scope,

an opportunity and revenue scheduling creation set of instructions to identify forecast data [[;]] **,** and

a forecast creation set of instructions that define attributes of **the** [[a]] particular

forecast, wherein the attributes fall within the set of parameters comprised

in the forecast series, to generate the particular forecast**,**

said processor configured to generate the particular forecast using the forecast

series.

2.   (**Currently Amended**) The computer system of claim 1, wherein

~~the hierarchy structure comprises a plurality of management levels,~~

the forecast series creation set of instructions further comprises instructions to

define **the** visibility rules that specify the forecast data that are visible to each

management level of the organization to be stored on the storage device,

and

include the visibility rules in the forecast series, and

the forecast creation set of instructions further comprises instructions to generate a

forecast for any management level of the organization, wherein

each forecast that is generated is based on forecast data that are visible to the

management level for which that forecast corresponds as specified by the

visibility rules.

3.   (**Canceled**)

4.   (Canceled)

5.   (Previously Presented)   The computer system of claim 1 wherein the opportunity and
revenue scheduling creation set of instructions further comprises instructions to

enable a member of the organization to submit a forecast to a superior; and

prevent the member from modifying the forecast after it has been submitted.

6.   (Previously Presented)   The computer system of claim 5, wherein the forecast creation set of instructions further comprises instructions to

   present forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

7 - 11. (Canceled)

12.   **(Currently Amended)**   A computer system comprising:

   a processor;

   a memory, coupled to the processor, and storing instructions executable on the processor, the instructions comprising

      a forecast series creation set of instructions, wherein

         a forecast series associated with the forecast series creation set of instructions comprises a set of parameters that define attributes of forecasts that are created from the forecast series, wherein the set of parameters

            identify hierarchy data defining members of an organization and a hierarchical position of each member[[,]] **in a hierarchy comprising a plurality of management levels,**

            determine an identity of a current forecast participant who is a member of the organization,

            identify members of the organization who are subordinate to the current forecast participant based on the hierarchy data,

            identify an acceptable range of dates over which forecasts generated from the forecast series cover,

            identify members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate the
forecasts from the forecast series,

identify a visibility mode for the forecasts generated from the
forecast series,

are employed to generate a forecast series comprising the identity
of the hierarchy data, the identity of the current forecast
participant, the identity of members of the organization
who are subordinate to the current forecast participant, the
identity of the acceptable range of dates, the identity of the
members of the organization to be included in the forecast,
the identity of the forecast data to be automatically
analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored
forecast series is accessible for use in generation of
forecasts upon request[[;]] **, and**

**the forecast series further comprises visibility rules, including a
maximum hierarchy depth search value n defining a search
scope such that a forecast generated for a manager is
generated from the manager's own forecast data and from
forecast data corresponding to members of the organization
who are defined to be both subordinate to the manager and
occupy a management level in the hierarchy that is less than or
equal to n levels below a management level occupied by the
manager, and there is at least one level in the hierarchy that is
below the last level included in the search scope,**

an opportunity and revenue scheduling creation set of instructions ~~comprising
instructions~~ to identify forecast data corresponding to the members of the
organization[[;]] **,** and

a forecast creation set of instructions that define attributes of **the** [[a]] particular
forecast, wherein the attributes fall within the set of parameters comprised

in the forecast series, the forecast creation set of instructions comprising instructions to

generate forecasts for one or more members of the organization who are identified as being subordinate to the current forecast participant, using the forecast series, and

present forecast data to the current forecast participant,

said processor configured to generate the particular forecast using the forecast series.

13.   (Previously Presented) The computer system of claim 12, wherein

the current forecast participant is a manager whose forecast is determined, at least in part, on forecasts that are submitted by one or more selected members of the organization who are subordinate to the manager, and

the forecast creation set of instructions further comprises instructions to

automatically generate a forecast for any member among said one or more selected members who has yet to submit a forecast, and

generate a forecast for the manager based on a combination of forecasts submitted by said one or more selected members and any forecast that is automatically generated.

14.   (Previously Presented)   The computer system of claim 13 wherein the forecast creation set of instructions further comprises instructions to

automatically calculate forecasts for said one or more selected members of the organization who are subordinate to the manager and have not submitted their forecast in a recursive manner from lower levels to higher levels in the organization's hierarchy, wherein

the manager occupies at least a second level of management in the organization's hierarchy.

15.   (**Currently Amended**)   A system comprising:

a processor;

a memory, coupled to the processor, and storing instructions executable on the processor,
    the instructions comprising

    a forecast series creation set of instructions, wherein

        a forecast series associated with the forecast series creation set of
            instructions comprises a set of parameters that define attributes of
            forecasts that are created from the forecast series, wherein the set
            of parameters

            identify hierarchy data defining a hierarchy structure of an
                organization, including data identifying a hierarchical
                position of members of the organization, **wherein the
                hierarchy structure comprises a plurality of
                management levels,**

            identify rules that specify forecast data that are visible to each
                member of the organization,

            identify an acceptable range of dates over which forecasts
                generated from the forecast series cover,

            identify members of the organization to be included in the forecast,
                the members derived from the hierarchy,

            identify forecast data to be automatically analyzed to generate
                forecasts from the forecast series,

            identify a visibility mode for forecasts generated from the forecast
                series,

            are employed to generate a forecast series comprising the identity
                of the hierarchy data, the identity of the rules, the identity
                of the acceptable range of dates, the identity of the
                members of the organization to be included in the forecast,
                the identity of the forecast data to be automatically
                analyzed, and the identity of the visibility mode, and

are stored together with the forecast series, wherein the stored forecast series is accessible for use in generation of forecasts upon request[[;]] **, and**

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value n defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, and there is at least one level in the hierarchy structure that is below the last level included in the search scope,

an opportunity and revenue scheduling creation set of instructions to send data comprising a set of interactive HTML components via a computer network to a client, a portion of which enable forecast data corresponding to members of the organization to be entered via the client[[;]] **,** and

a forecast creation set of instructions that define attributes of **the** [[a]] particular forecast, wherein the attributes fall within the set of parameters comprised in the forecast series to

generate the particular forecast for members of the organization using the forecast series, wherein each forecast is generated based on forecast data that are visible to corresponding members according to the visibility rules, and

send forecast data corresponding to the forecast to the client to be viewed by a user through use of the set of interactive HTML components**,**

said processor configured to generate the particular forecast using the forecast series.

16.   **(Currently Amended)**   The system of claim 15, wherein
        ~~the hierarchy structure comprises a plurality of management levels,~~

        the forecast series creation set of instructions further comprises instructions to
                define visibility rules that specify the forecast data that are visible to each
                        management level of the organization, and
                include the visibility rules in the forecast series, and

        the forecast creation set of instructions further comprises instructions to generate a
                forecast for any management level of the organization, wherein
                each forecast that is generated is based on forecast data that are visible to the
                        management level for which that forecast corresponds as specified by the
                        visibility rules.

17.   **(Canceled)**

18.   (Canceled)

19.   (Previously Presented)   The system of claim 15, wherein the forecast creation set of
instructions further comprises instructions to:
        enable a member of the organization to submit a forecast to a superior; and
        prevent the member from modifying the forecast after it has been submitted.

20.   (Previously Presented)   The system of claim 19 wherein the forecast creation set of
instructions further comprises instructions to enable one or more of the superior to which the
forecast was submitted and a system administrator to unsubmit the forecast such that the member
who submitted that forecast is enabled to modify the forecast.

21.   (Previously Presented)   The system of claim 15, wherein
        the forecast creation set of instructions further comprises instructions to send data to the
                client, and

the set of interactive HTML components are configured to present the forecast data in a
graphical format that enables a member to compare forecast data corresponding to
related forecasts over time that are specified to be visible to that member.

22 - 27.   (Canceled)

28.   **(Currently Amended)**   A system comprising:

a processor;

a memory, coupled to the processor, and storing instructions executable on the processor,
the instructions comprising

a forecast series creation set of instructions, wherein

a forecast series associated with the forecast series creation set of
instructions comprises a set of parameters that define attributes of
forecasts that are created from the forecast series, wherein the set
of parameters

identify hierarchy data defining members of an organization and a
hierarchical position held by each member to be stored in a
database **in a hierarchy comprising a plurality of
management levels,**

determine an identity of a current forecast participant who is a
member of the organization and using the client,

identify members of the organization who are subordinate to the
current forecast participant based on the hierarchy data,

identify an acceptable range of dates over which forecasts
generated from the forecast series cover,

identify members of the organization to be included in the forecast,
the members derived from the hierarchy,

identify forecast data to be automatically analyzed to generate the
forecasts from the forecast series,

identify a visibility mode for the forecasts generated from the
forecast series,

are employed to generate a forecast series comprising the identity
of the current forecast participant, the identity of members
of the organization who are subordinate to the current
forecast participant, the identity of the acceptable range of
dates, the identity of members of the organization to be
included in the forecast, the identity of forecast data to be
automatically analyzed, and the identity of the visibility
mode, and

are stored together with the forecast series, wherein the stored
forecast series is accessible for use in generation of
forecasts upon request[[;]] **, and**

**the forecast series further comprises visibility rules, including a
maximum hierarchy depth search value n defining a search
scope such that a forecast generated for a manager is
generated from the manager's own forecast data and from
forecast data corresponding to members of the organization
who are defined to be both subordinate to the manager and
occupy a management level in the hierarchy that is less than or
equal to n levels below a management level occupied by the
manager, and there is at least one level in the hierarchy that is
below the last level included in the search scope,**

an opportunity and revenue scheduling creation set of instructions to send data
corresponding to a set of interactive HTML components via a computer
network to a client that enable forecast data corresponding to members of
the organization to be entered by a user of the client[[;]] **,** and

a forecast creation set of instructions that define attributes of **the** [[a]] particular
forecast, wherein the attributes fall within the set of parameters comprised
in the forecast series to

generate forecasts, using the forecast series, for one or more members of
the organization who are identified as being subordinate to the
current forecast participant, and

send forecast data to the client to be displayed to the user via the set of
interactive HTML components,

**said processor configured to generate the particular forecast using the forecast
series**.

29.   (Previously Presented)   The system of claim 28, wherein
the current forecast participant is a manager whose forecast is determined, at least in part,
on forecasts that are submitted by one or more selected members of the
organization who are subordinate to the manager, and
the forecast creation set of instructions further comprises instructions to
automatically generate a forecast for any member among said one or more
selected members who has yet to submit a forecast, and
generate a forecast for the manager based on a combination of forecasts submitted
by said one or more selected members and any forecast that is
automatically generated.

30.   (Previously Presented)   The system of claim 29, wherein the forecast creation set of
instructions further comprises instructions to
automatically calculate forecasts for said one or more selected members of the
organization who are subordinate to the manager and have not submitted their
forecast in a recursive manner from lower levels to higher levels in the
organization's hierarchy, wherein
the manager occupies at least a second level of management in the organization's
hierarchy.

31 - 44.   (Canceled)

45.   **(Currently Amended)** A computer implemented method comprising:

receiving an identification of hierarchy data defining a hierarchy structure of an
organization, including data identifying a hierarchical position of each member of
the organization**, wherein the hierarchy structure comprises a plurality of
management levels**;

receiving an identification of an acceptable range of dates over which forecasts generated
from a forecast series cover;

receiving an identification of members of the organization to be included in the forecasts
generated from the forecast series, the members derived from the hierarchy;

receiving an identification of forecast data to be automatically analyzed to generate the
forecasts from the forecast series;

receiving an identification of a visibility mode for the forecasts generated from the
forecast series;

generating the forecast series comprising the identity of the hierarchy data, the identity of
the date and the period of time, the identity of the members of the organization to
be included in the forecast, the identity of the forecast data to be automatically
analyzed, and the identity of the visibility mode, wherein

**the forecast series further comprises visibility rules, including a maximum
hierarchy depth search value n defining a search scope such that a
forecast generated for a manager is generated from the manager's
own forecast data and from forecast data corresponding to members
of the organization who are defined to be both subordinate to the
manager and occupy a management level in the hierarchy structure
that is less than or equal to n levels below a management level
occupied by the manager,**

**there is at least one level in the hierarchy structure that is below the last level
included in the search scope, and**

said generating the forecast series is performed using a first computer processor;

storing the forecast series, wherein

the stored forecast series is accessible for use in generation of a particular forecast

upon request, and

said storing is performed using a memory coupled to the first computer processor;

and

generating the particular forecast using the forecast series wherein

said generating the particular forecast is performed using a second computer

processor.

46.   (**Currently Amended**) The computer implemented method of claim 45, wherein the hierarchy structure comprises a plurality of management levels and further comprising:

receiving a definition of **the** visibility rules ~~that specify the forecast data that are~~

~~visible to each management level of the organization to be stored on the~~

~~storage device~~; **and**

~~including the visibility rules in the forecast series; and~~

generating a forecast for any management level of the organization using the forecast

series, wherein each forecast that is generated is based on forecast data that are

visible to the management level for which that forecast corresponds as specified

by the visibility rules, wherein

said generating the forecast is performed using a third computer processor.

47.   (Previously Presented)   The computer implemented method of claim 45, further comprising presenting the forecast in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member, wherein

said presenting the forecast in a graphical format is performed using a display coupled to

a third computer processor.

48.   (**Currently Amended**) A machine-readable media on which a plurality of machine-executable instructions are stored that when executed by a machine generates forecast information corresponding to an organization by performing the operations of:

identifying hierarchy data defining a hierarchy structure of an organization, including data identifying a hierarchical position of each member of the organization, **wherein the hierarchy structure comprises a plurality of management levels**;

identifying an acceptable range of dates over which forecasts generated from a forecast series cover;

identifying members of the organization to be included in the forecasts generated from the forecast series, the members derived from the hierarchy;

identifying forecast data to be automatically analyzed to generate the forecasts from the forecast series;

identifying a visibility mode for the forecasts generated from the forecast series;

generating the forecast series comprising the identity of the hierarchy data, the identity of the date and the period of time, the identity of the members of the organization to be included in the forecast, the identity of the forecast data to be automatically analyzed, and the identity of the visibility mode**, wherein**

the forecast series further comprises visibility rules, including a maximum hierarchy depth search value n defining a search scope such that a forecast generated for a manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy structure that is less than or equal to n levels below a management level occupied by the manager, and

there is at least one level in the hierarchy structure that is below the last level included in the search scope;

storing the forecast series, wherein the stored forecast series is accessible for use in generation of a particular forecast upon request; and

generating the particular forecast using the forecast series.

49.   (Canceled)

50.   (**Currently Amended**) A computer implemented method comprising:

   receiving an identification of hierarchy data defining a hierarchy structure of an

   organization, wherein

   the hierarchy data comprises a hierarchical position of each member of the

   organization**, and**

   the hierarchy structure comprises a plurality of management levels;

   receiving an identification of an acceptable range of dates over which forecasts generated

   from a forecast series cover;

   receiving an identification of members of the organization to be included in the forecasts

   generated from the forecast series, the members derived from the hierarchy;

   receiving an identification of forecast data to be automatically analyzed to generate the

   forecasts generated from the forecast series;

   generating a forecast series comprising the identity of the hierarchy data, the identity of

   the acceptable range of dates, the identity of the members of the organization to

   be included in the forecast, and the identity of the forecast data to be

   automatically analyzed, wherein

   the forecast series further comprises visibility rules, including a maximum

   hierarchy depth search value n defining a search scope such that a

   forecast generated for a manager is generated from the manager's

   own forecast data and from forecast data corresponding to members

   of the organization who are defined to be both subordinate to the

   manager and occupy a management level in the hierarchy structure

   that is less than or equal to n levels below a management level

   occupied by the manager,

   there is at least one level in the hierarchy structure that is below the last level

   included in the search scope, and

   said generating is performed using a first computer processor;

   storing the forecast series, wherein

   the stored forecast series is accessible for use in generation of a particular forecast

   upon request, and

        said storing is performed using a memory coupled to the first computer processor;

            and

generating the particular forecast using the forecast series, wherein

        said generating the particular forecast is performed using a second computer

            processor.

51-64. **(Canceled)**

65.   (Previously Presented) The computer system of claim 1, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

66.   (Previously Presented) The computer system of claim 12, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

67.   (Previously Presented) The system of claim 15, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

68.   (Previously Presented) The system of claim 28, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

69.   (Previously Presented) The computer implemented method of claim 45, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

70.   (Previously Presented) The machine-readable media of claim 48, wherein

the forecast series further comprises a field indicating whether the forecast series is

        available for forecasting purposes.

71.   (Previously Presented) The computer implemented method of claim 50, wherein
       the forecast series further comprises a field indicating whether the forecast series is
           available for forecasting purposes.

Conclusion

2.   Claims 1, 2, 5, 6, 12-16, 19-21, 28-30, 45-48, 50, and 65-71 are allowed.

3.   Any inquiry concerning this communication or earlier communications from the

examiner should be directed to Susanna M. Diaz whose telephone number is (571) 272-

6733. The examiner can normally be reached on Monday-Friday, 8 am - 4:30 pm.

       If attempts to reach the examiner by telephone are unsuccessful, the examiner's

supervisor, Kambiz Abdi can be reached on (571) 272-6702. The fax phone number for

the organization where this application or proceeding is assigned is 571-273-8300.

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       /Susanna M. Diaz/
       Primary Examiner, Art Unit 3684